Avalon Solution
Email Marketing Campaign
User Manual

Email Marketing Made Easy!

Avalon Solution

Turning Browsers Into Buyers!™

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1. Introduction to Email Marketing Campaign Services

Avalon Solution introduces Email Marketing Campaign, a must have service to grow your business. Email marketing is the most effective and cost-efficient way to enhance relationships with your existing customers as well as attract prospects early in the purchasing cycle. With Avalon's Email Marketing, you can quickly and easily communicate with, as well as generate an immediate and measurable response from your customers and prospects.

Utilizing this service, you can easily create, manage and track your Email Marketing Campaigns. Using attractive and professional looking emails, along with your company logo, store information and high quality images, will enable you to stay in touch with existing customers as well as encourage new and repeat business.

In this User Manual, we will learn how to create and perform an Email Campaign. This manual will help you get started quickly by using the basic features of the application.

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1.1. How to Get Started

Ø Open the following URL with the help of any standard web browser
http://emailmarketing.avalonsolution.com/

Ø Enter the valid **User Name** and **Password** and press **Login** button.

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1.2. Dashboard

Ø On successful Login, you will get Email Marketing Campaign Services – Dashboard or Landing Page.

> The Top Navigator helps you to shift between Lists, Subscribers, Campaign and Reports Modules
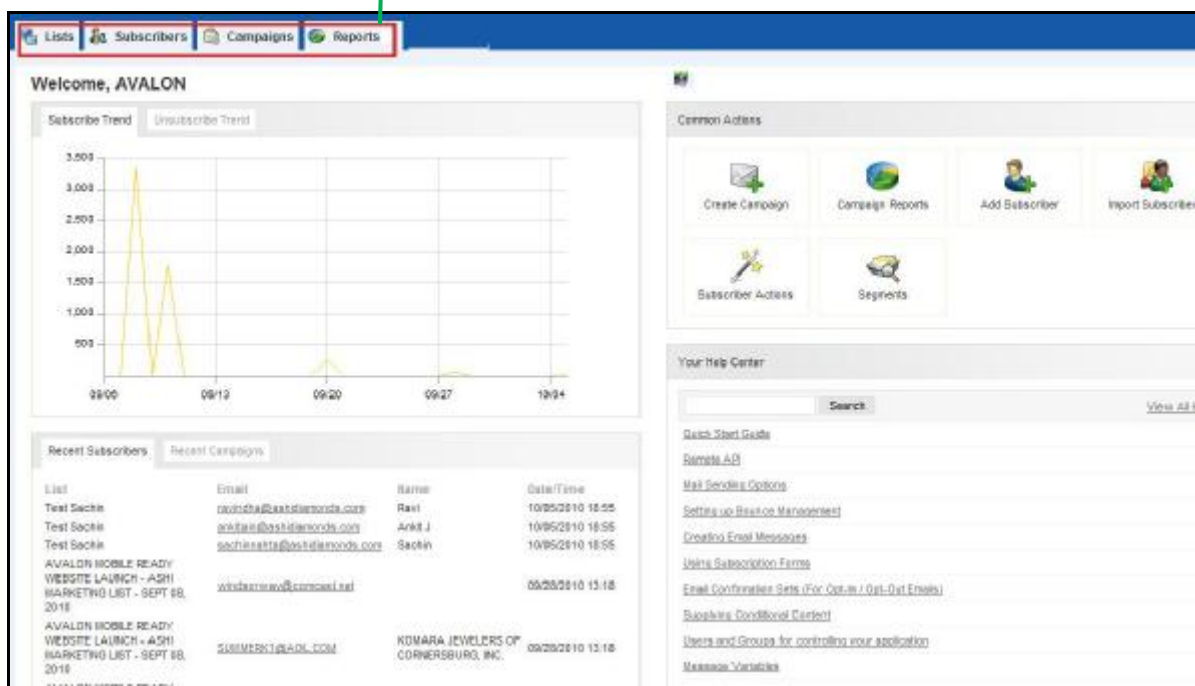
Ø The Application provides Four modules to work on:

- **Lists**
  This Module allows you to manage your Email Marketing Subscribers List. You can create or import a Subscribers List very easily. A List is required to create or import into the application before creating an Email Campaign.

- **Subscribers**
  This Module allows you to manage your Subscribers. You can add, edit or manage your Subscribers here.

- **Campaigns**
  This Module allows you to create and send Email Marketing Campaigns. You can use Email Templates provided by Avalon Solution and update them as per your requirements or take Avalon Solution's Professional Services for designing a HTML Email Template based on your idea or requirements.

- **Reports**
  This Module allows you to view detailed report for Email Marketing Campaigns.

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2. Create List and Add Subscribers

2.1 How to Create a Subscribers List

Ø Creating a Subscribers List is very easy:

- Mouse Over on Lists on the top of the Navigator
- Click on Manage Lists

Ø Your Account will display one default List – **Avalon Solution (Please Do Not Edit / Delete this List)**
This list contains all the Avalon Solution Default Email Templates and editing or deleting this list will stop you to accessing all Email Templates.
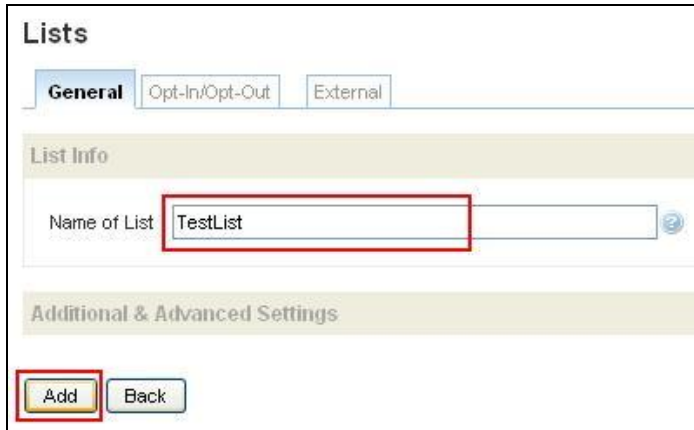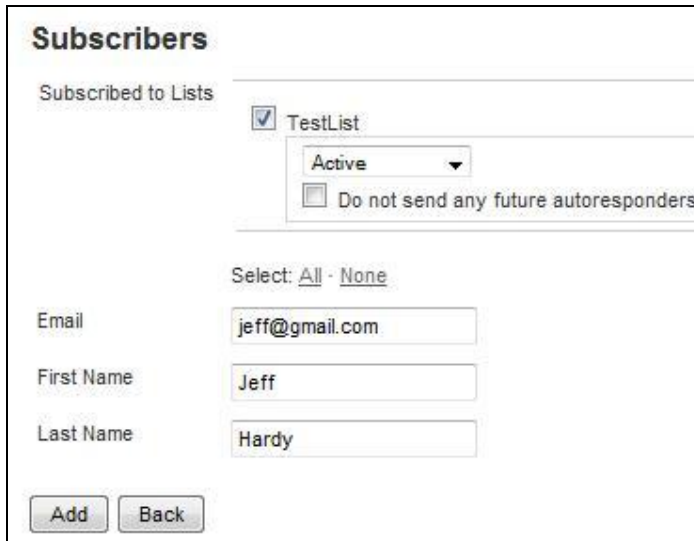

Ø To create a List, click on **Add** button.

Ø Provide a **List Name** and click on **Add** Button.

Ø On clicking **Add** button, it will give you options for Add or Import Subscribers.

Ø By clicking **Add Subscriber** button, you can add each and every Subscriber manually.

Ø On clicking **Add** button, you will get list of all the Subscribed that you have added in all lists. If you need to add more Subscribers in your newly created List then click Add button and it will allow you to add more subscribers in the same manner.

Ø You can add a Subscriber in more than one List by selecting multiple Lists.

2.2 How to Import a Subscribers List

Ø By clicking **Import Subscribers,** you can import all your Subscribers in one shot (we recommend this).
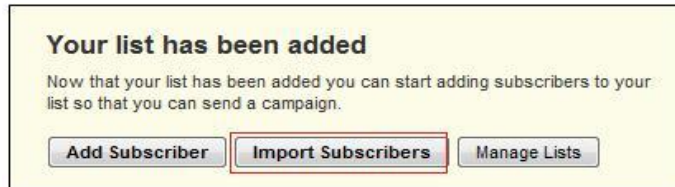
> **Your list has been added**
> Now that your list has been added you can start adding subscribers to your list so that you can send a campaign.
>
> [Add Subscriber] [Import Subscribers] [Manage Lists]

Ø On clicking **Import Subscribers** button, you will get **Subscriber Import Tool** to import a CSV File.

Subscriber Import Tool

Import Options

Import Into
- XMAS 2010
- TestList

Select: All - None

Import As
Active

Autoresponder Options
- ◯ Send Autoresponders to these subscribers
- ⦿ Never send any Autoresponders to these subscribers

Import Settings
- ☑ Do not import previously bounced addresses
- ☑ Do not import addresses which have been unsubscribed in the past
- ☑ Update existing subscribers
- ☐ Send the last broadcast campaign when importing

Import Source
- ⦿ Import from a file
  [_____] [Browse...]
  Delimiter: Comma ,
- ◯ Import using copy/paste

[Import]

> You can add the subscribers in more than one List at the same time
>
> You can select all or just select the one in which you want to import your subscribers

> Select the options as shown

> Select the options as shown

> Click on Import from a file option and click on Browse button to locate the List of your Subscribers in CSV Format

Ø   Your List should contain Email Id, First Name and Last Name of the Subscriber.

Ø   Browse the file on the local machine to upload the subscribers into the List. You need to browse the file just created and saved in .CSV Format.
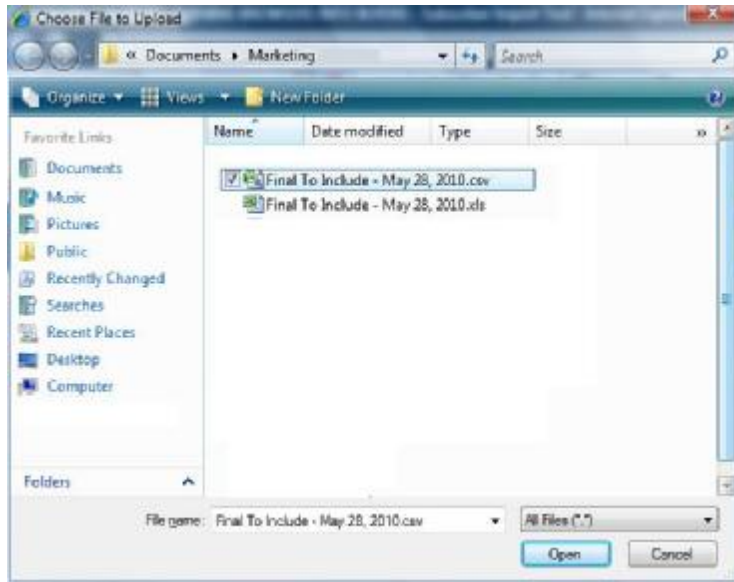
Ø   If you are not clear on How to Create a CSV Format Excel Sheet, please read "**How to Create CSV File Format**" available on Page # 13 – Point # 2.6

Ø   If you want to change the file after uploaded on the server, you can do it by uncheck the against the file name. After few seconds you will again find the browse button.
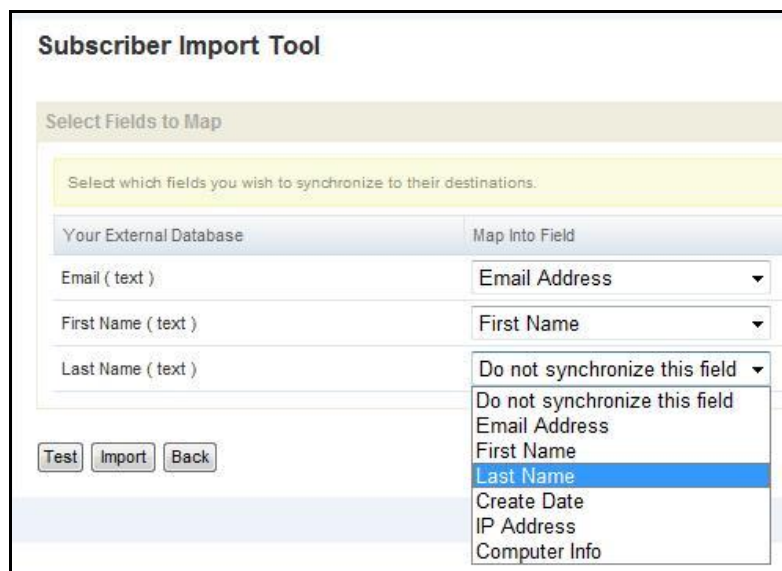
Ø When we import a CSV Formatted Subscribers List, application ask us to map the List data fields with the System data fields. Its shows data available in the first row of all the columns. Your List should contain Email Id, First Name and Last Name of the Subscriber.

The fields on the Left Side will be headers of your CSV file

You can map your CSV file fields with the drop down

Ø You need to ensure that you have created subscriber fields for all of the fields you intend to import. To create a subscriber field go to List Settings and click on Subscriber Fields. On clicking Import Subscribers button, you will get **Subscriber Import Tool** to import a CSV File.

Ø The importer utilizes a simple drop down method that makes it easy for each column to be matched with the corresponding subscriber field.

Ø Ensure that you have created subscriber fields for all of the fields you intend to import. To create a subscriber field go to List Settings and click on Subscriber Fields. On clicking Import Subscribers button, you will get **Subscriber Import Tool** to import a CSV File.

Ø Map the fields as shown in below screenshot and click on **Import** Button.

Ø You can view the progress of the import Map the fields as shown below.
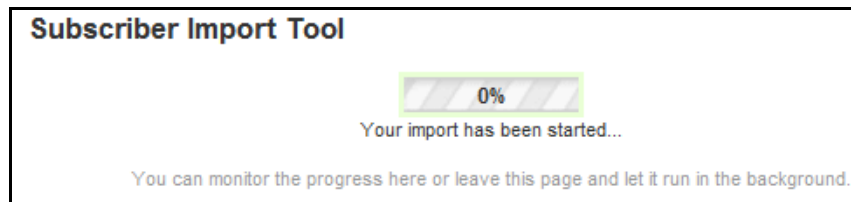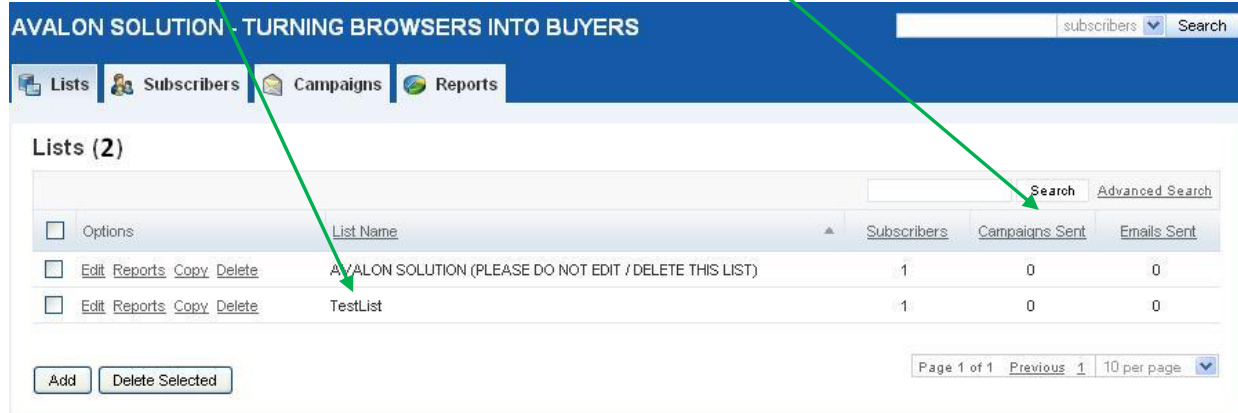
Ø Once all the subscribers are imported, mouse over Lists and select Mange Lists option.

Ø You will see the **TestList** in your Lists.

Your Created/Imported List will appear with number of the Subscribers in that List

You can also view the Campaigns and Emails sent against a particular List
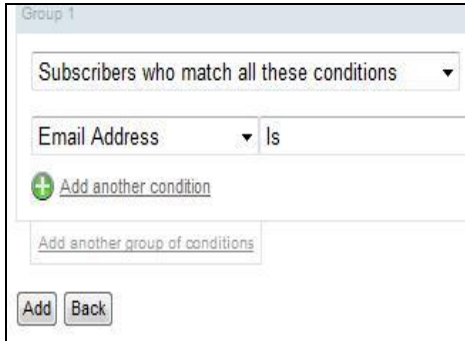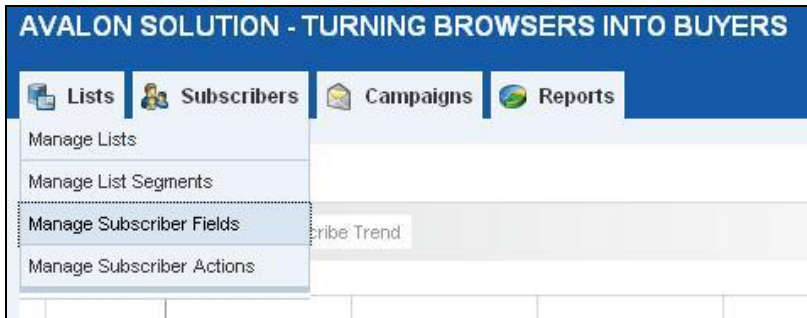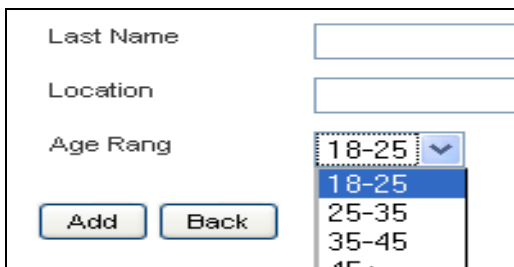
2.3   Manage List Segments

Ø   You can segment your List to send a targeted Email Campaign. You can create a segment for people in a certain age range and location or even based on previous actions of a subscriber such as creating a segment for all subscribers who clicked on a particular link in the past or forwarded your past Email Campaign to a friend.

2.4   Manage Subscriber Fields

Ø   You can include optional fields such as text fields, text boxes, check boxes, radio buttons and drop downs. You can even specify whether a field is required or not. Personalize your mailings with the optional field data or use optional fields to create sending filters. You can allow a subscriber field into multiple lists. Also you can search subscribers by subscriber fields.

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2.5 Manage Subscriber Actions

Ø Subscriber Actions allow you to set certain things to happen when a subscription or un-subscription occurs, a link is clicked, a campaign read, etc. You can setup subscriber actions to update subscriber info, perform subscription tasks, send campaigns, and more. Each set of actions can be for any campaigns in a specific list or just for a specific campaign in a specific list.

2.6 How to Create CSV File Format

Ø In order to import a List, you need an Excel Sheet in .CSV Format. First you need to create a Microsoft Excel Sheet which must contain the proper and essential information of all of your Subscribers. This Excel Sheet must contain the following three basic fields:

  i.   Email Address of Subscriber
 ii.   First Name of Subscriber
iii.   Last Name of Subscriber

   Excel Sheet may have more than above given fields.

Ø For example, see the below screenshot:

Ø You can include as many customer and their details in this excel sheet. All will be imported into the software in just one single click. The first row is considered as Header which will be mapped when you import the Excel Sheet into the Application.

Ø Email Address is mandatory field and if any of the email address is missing or not in proper format then that entire row will not be imported into the List.

Ø You have to save the Excel Sheet as .CSV format. For this, click on File > Save as
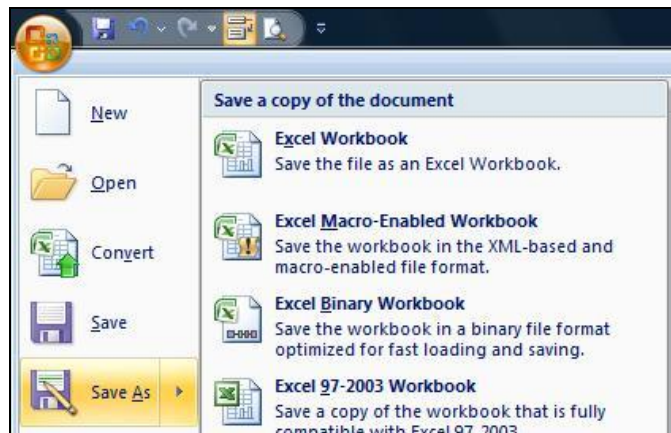
Ø From Save as type drop down, select CSV (Comma Delimited)(*.CSV) and save a copy on your local machine.
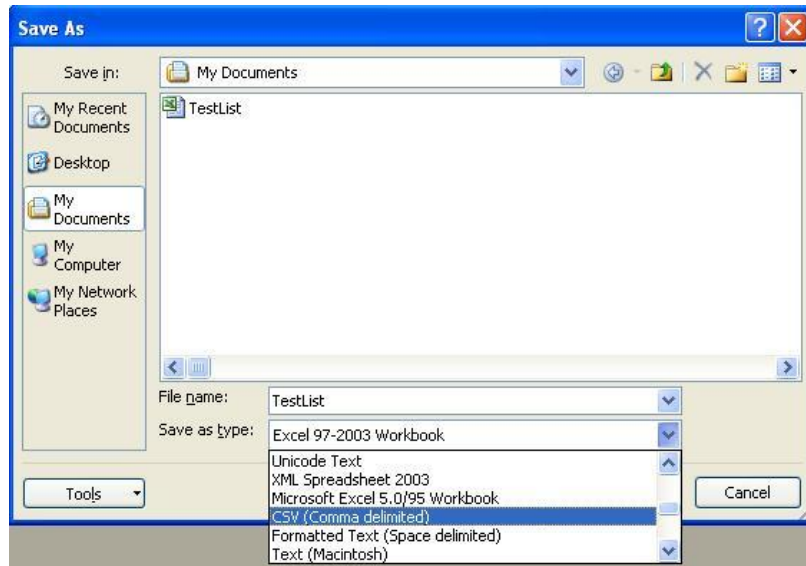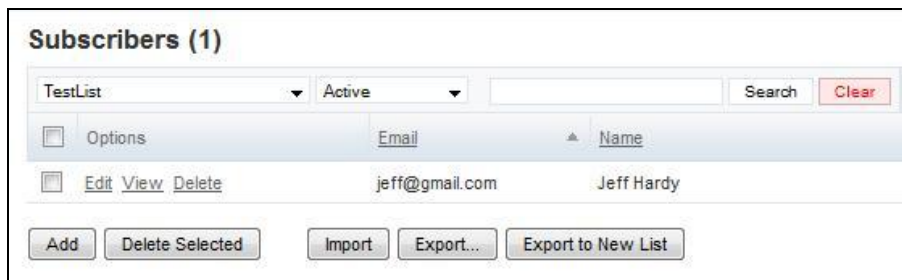
Ø Your .CSV File is ready to import into the application.

2.7 Subscribers
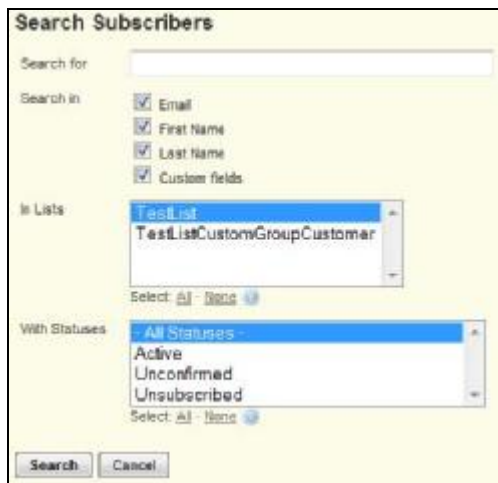
Ø To add, edit or delete any subscribers to any existing lists, you need to select Subscribers from the top of the page and select appropriate option:
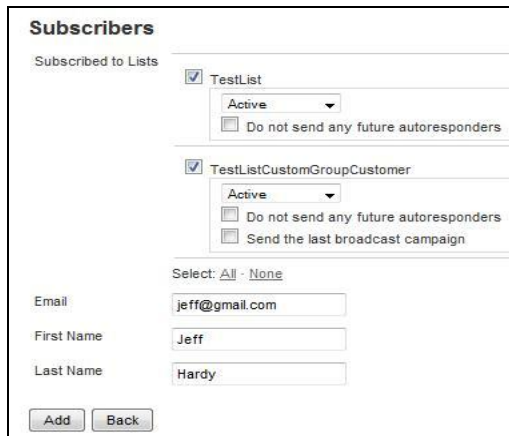
Ø Manage Subscribers option is used to edit or delete any existing Subscriber from a single list or from multiple lists.

Ø Search Subscribers option is used to find subscribers by email address, name and other fields.

Ø Add Subscriber is used to add a new subscriber manually to one or more than one list.

Ø Import Subscribers option is used to add subscribers by importing a CSV Format Subscribers List to one or more than one list.

Ø On clicking **Import Subscribers**, you will get **Subscriber Import Tool** to import a CSV File.

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Lists | Subscribers | Campaigns | Reports

Manage Subscribers
Find Subscriber(s)
Welco
Add Subscriber
Subscr
Import Subscribers
1,80   Export Subscribers
1,60
1,40   Exclusion List
1,20   Batch Actions

Subscriber Import Tool

Import Options

Import Into
XMAS 2010
TestList

Select: All - None

Import As
Active

Autoresponder Options
  ○ Send Autoresponders to these subscribers
  ● Never send any Autoresponders to these subscribers

Import Settings
  ☑ Do not import previously bounced addresses
  ☑ Do not import addresses which have been unsubscribed in the past
  ☑ Update existing subscribers
  ☐ Send the last broadcast campaign when importing

Import Source

  ● Import from a file
      [   ] [Browse...]

      Delimiter: Comma ,

  ○ Import using copy/paste

[Import]

You can add the subscribers in more than one List at the same time

You can select all or just select the one in which you want to import your subscribers

Select the options as shown

Select the options as shown

Click on Import from a file option and click on Browse button to locate the List of your Subscribers in CSV Format

Ø On clicking **Export Subscribers**, you will get **Export Subscriber Tool** to export your existing subscribers and save on your local machine.

Ø You can export to a file, or to a new mailing list. Choose which fields you'd like to export, as well as the scope of how many.

Ø **Exporting to a file**: You can export subscribers to any of the following file types:

- CSV
- XLS
- XML

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3. Create and Send Campaigns

3.1 Create New Campaign

Ø Now let us create a Test Campaign and see what features do the application provides:

- Mouse Over on Campaigns on the top of the Navigator
- Click on Create New Campaign
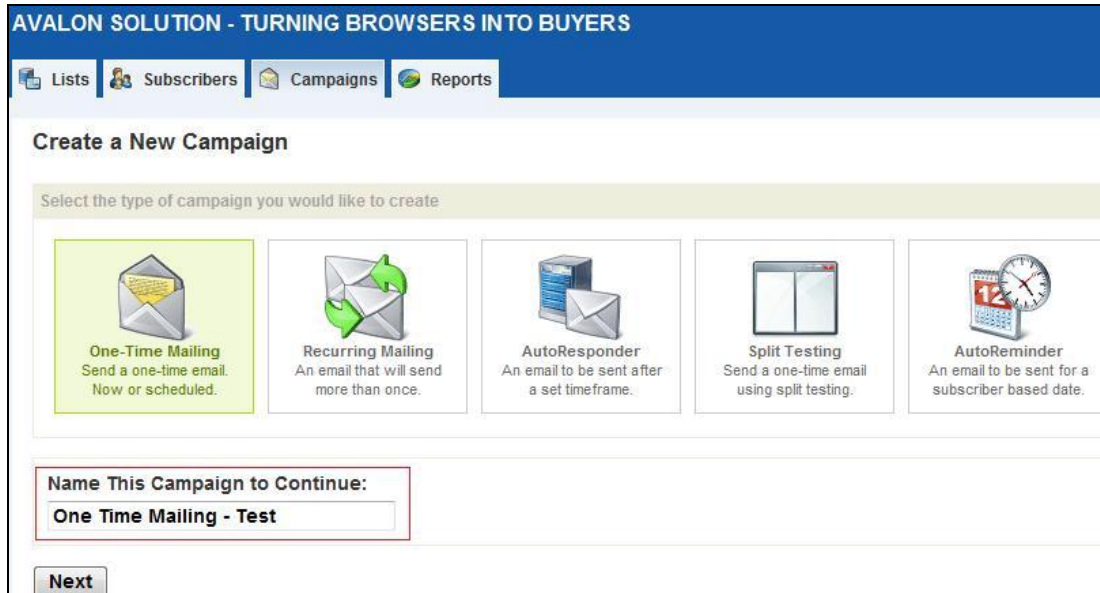
Ø You will get below screen and by default **One-Time Mailing** option will be selected.

Ø We suggest try sending a One-Time Mailing. You can further resend the Campaign according to your choice. Once you choose your Campaign Type and enter Name of your Campaign, click **Next** button.

Ø You will be now asked for the mailing list(s) you wish to send to. Choose the list or lists and click **Next** button. Since we created Test List therefore it shows in select box. It will show multiple List based on what you created.

Ø   The campaign guide will now direct you on how to create the message contents.
    You have three options to create a Campaign:

i.   **Start New (Blank, from scratch)**
     This is all new fresh start to create a campaign message. You will be redirected to HTML and Text
     Editor to create your Campaign Message.
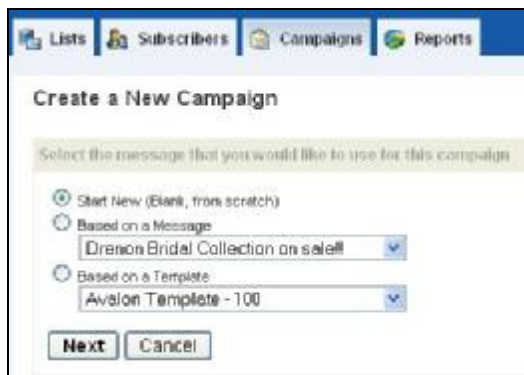
ii. **Based on a Message**
     This option provides you facility to utilize your saved messages. You can create the messages and
     utilize them for sending your Campaign.

iii. **Based on a Template**
     You can use Templates to start your Campaign. Avalon Solution provides you more than 50
     professional looking HTML Email Templates to start with your Email Campaigns.
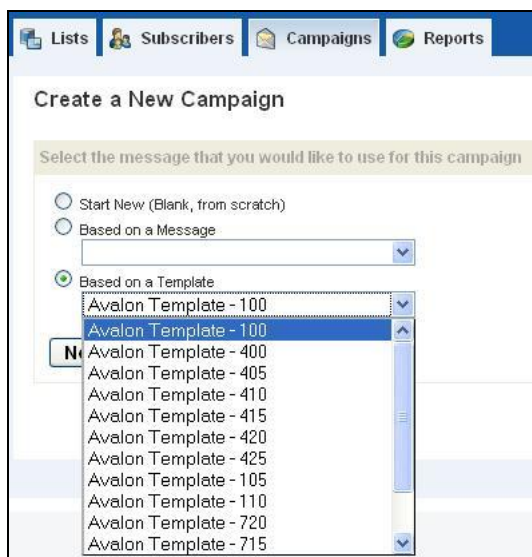
Ø   Select appropriate option and click on **Next** button.

Ø   For example we have selected Based on a Template option. All the default templates provided by
    Avalon Solution will be shown in the drop down menu. You can select existing Template or request
    Avalon to create Customized Template exclusive with your branding and requirements.

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Ø Enter the From Name, From Email, Subject, and Message Contents and continue to the next step. Please Note: you must enter the correct email address. Your Customer may get back to you using From Email Address.

Ø Your selected Email Template will appear in the Visual Editor.

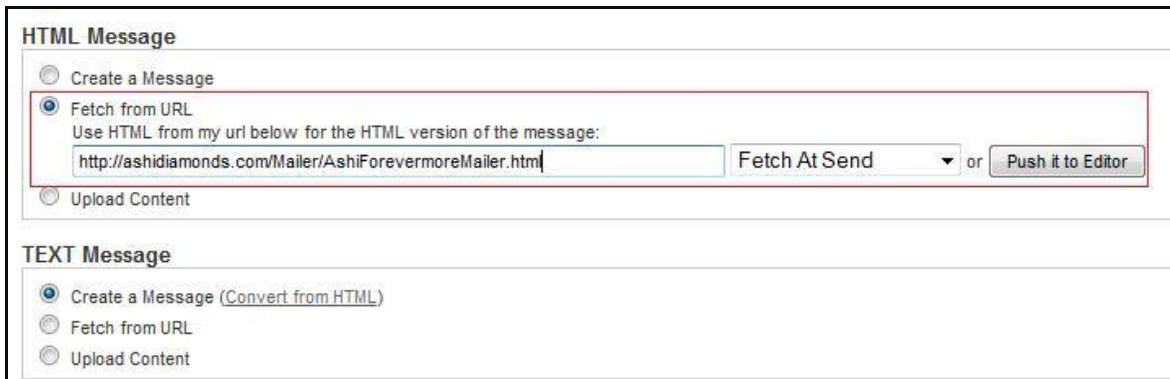Ø You will get three options to add contents to your Campaign.

i. **Create Message**
    Edit the HTML editor with your choice and options.
    This is the basic editing using HTML Editor or Text Editor.

ii. **Fetch from URL**
    You have options to fetch the contents of the template from any specific URL of your choice.
    For example: Here it is entered an URL for HTML Emailer. Click on **Push it to Editor** button.
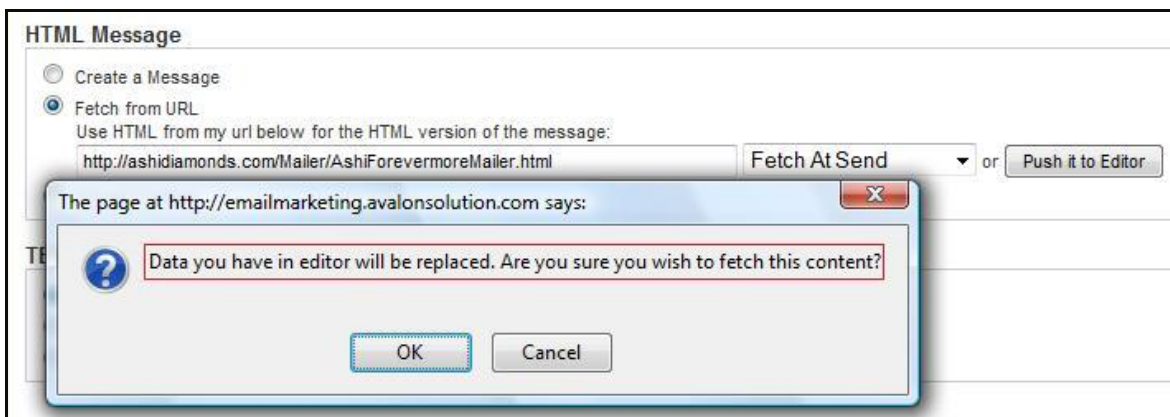
Please Note: once you click on **Push it to Editor** button, the current contents of the Editor will be replaced by the contents of URL.

iii. **Upload Content**
    This option provides you the facility to direct upload the contents into the Campaign. Click on **Browse** button and locate the file from your computer.

Please Note: The Text Message will be uploaded only with Text File. The file may be MS Word or simple Text.

Please review the contents of the Campaign and Click on **Add Message** button on the bottom of the page to get to the next step. Please do not attach any file along with your Campaign as it may spam your Email Campaign.

3.2   Visual Editor / HTML Editor

Ø   You can edit the text, images and content of the HTML Email Template in the Visual Editor or HTML Editor.

Ø   Email Template editing is very easy with Visual Editor or HTML Editor. Most of the edit options are as same as available in MS Word. You can update your Company Logo, Text, Address, Images and Text as per your requirements.
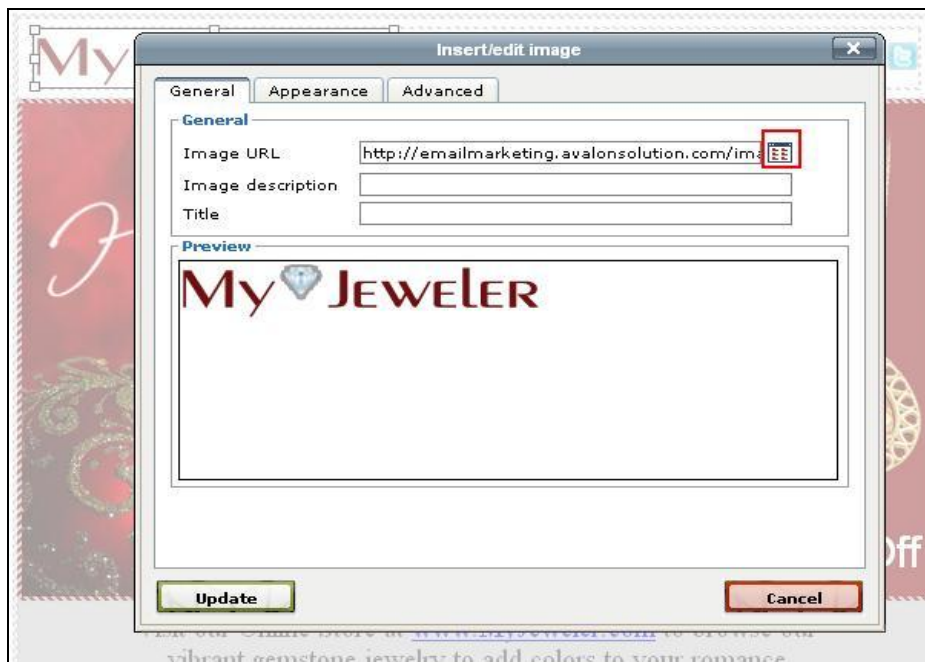
Ø **Update Company Logo or Other Images**

You can easily update your Company Logo or other images.

i. Select the "My Jeweler" Logo.

ii. Click the Image icon on the toolbar that says "Insert/edit Image".
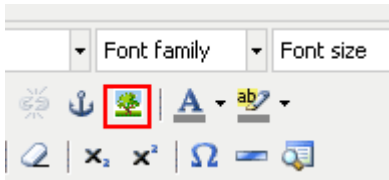

iii. This will open the Insert/edit image dialog box.

iv. Click on the button available for the Image URL. It will show you the Image Manager containing all images. Press "Upload" button for your Company Logo if it's not yet uploaded to the server.
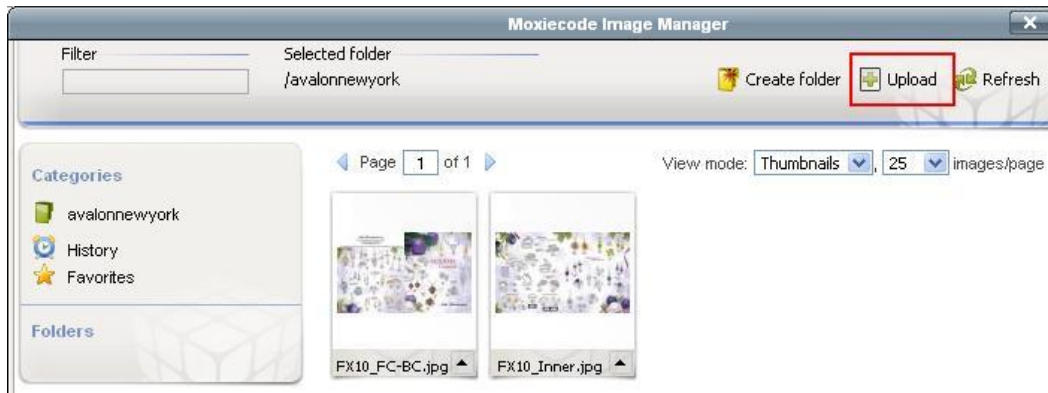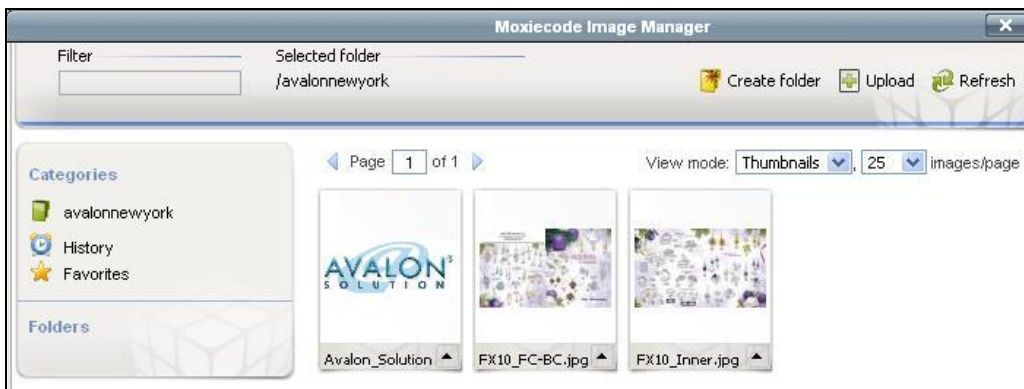
v. You can upload your Company Logo from your computer. You can upload .gif, .jpg and .png file formats with 10MB maximum size. Once you browse and select the Company Logo, it will give you an option to upload it to server.
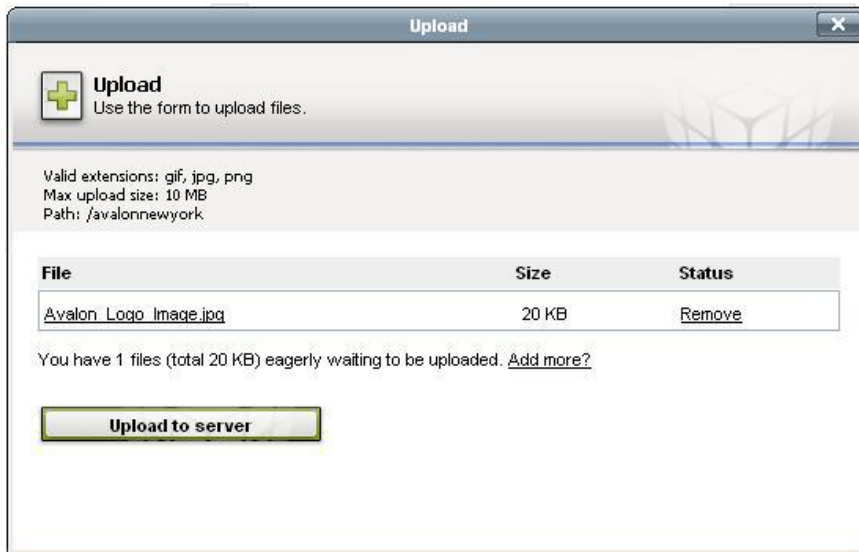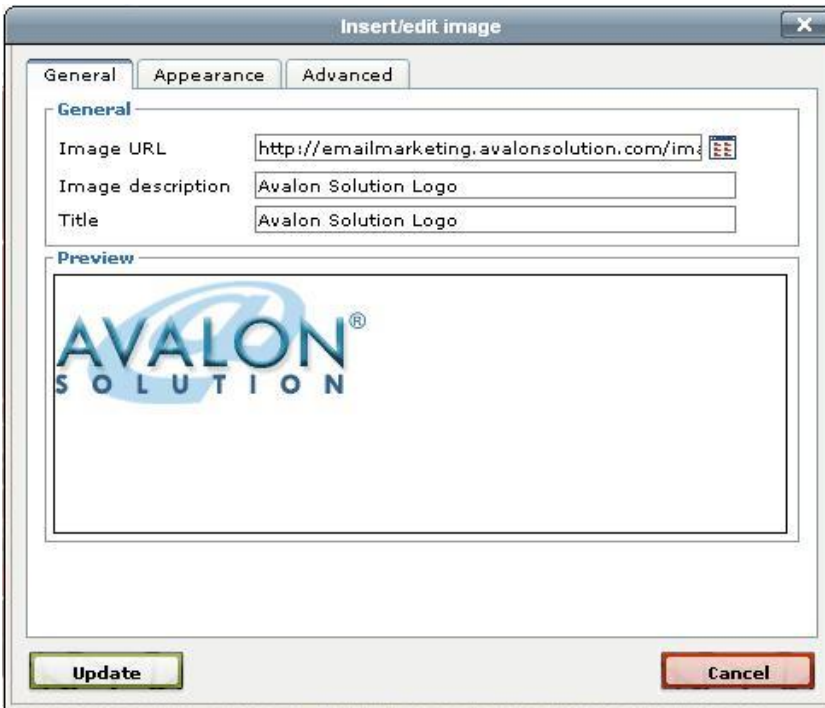

vi. Once your Company Logo is uploaded to the server, you will be able to see it in your Image Manager.

vii.   On clicking your Company Logo, it will be selected.

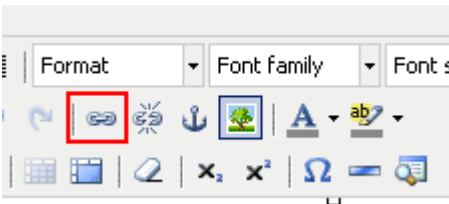viii.   On clicking **Update** button, Company Logo will get updated on your Email Template.

ix.   You can update the Images of your Email Template in the same manner.

Ø   **Text or Image Links**

Any text or image within your email can be turned into a link.

i.   Select the text or image you want to link.

ii.   Click the Chain Link icon on the toolbar that says "Insert/edit Link".


iii.   This will open the Insert/edit Link dialog box.

iv.   Type in the web address to which you want to link. Be sure to include the http:// portion of the link like so: http://www.example.com

v.   There are more options available or customization. You can open the hyperlink in a new window. You can name that new window of your choice and many more.

vi.   Click **Insert** button.

vii.   Your text or image will work as a link now.

Ø   **Email Address Links**

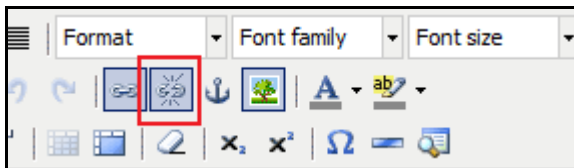In addition to linking to your website, you can also link both text and images to an email address.

i.   Choose the image or text you want to link.

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ii. Click the chain link icon on the top row of the toolbar. This will open the Insert Hyperlink dialog box.
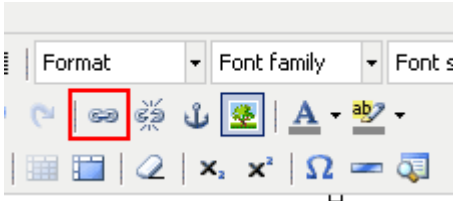
iii. Type in the email address to which you'd like to link. The address should be preceded by the phrase mailto:, making the end result look like **mailto:support@example.com**

iv. Click **Insert** button.

v. Your text or image will have a link to an email address now.

Ø You remove hyperlink by click on broken chain button present near hyperlink button**.**

Ø You need to update your Store Location, Phone Number, Email Address and Store Hours.

> Store Location: 123 Main Street * MyCity, State 12345 * Tel: 123-456-7890 * Email: info@mycompany.com
> Store Hours: Monday - Friday: 9:00am - 8:00pm * Saturday - Sunday: 9:00am - 7:00pm

Ø Email Campaigns are required to have **Unsubscribed Link**. Email Templates provided by the Avalon Solution contains this unsubscribed link.

> Click Here to Unsubscribe
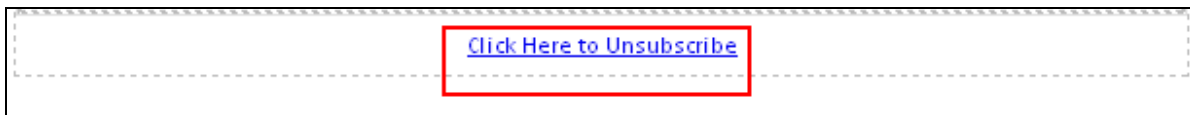
Ø The email message created by you should also have **Unsubscribed Link**. You may provide the default un-subscription link available in the system or manually type the link in the message.

Ø To give Unsubscribed Link available in the system, click on the "Personalize Message" on the top of the Visual Editor or HTML Editor.

> Insert Template   Insert RSS   Insert Conditional Content   **Personalize Message**

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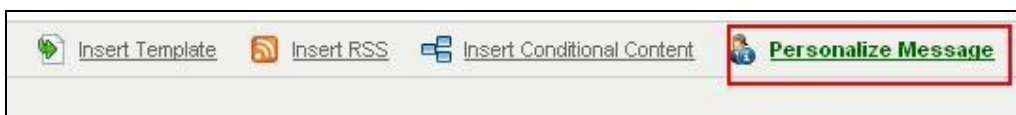
Ø On clicking "Personalize Message" link, Personalize Tags will appear. You can select the Unsubscribed Link and click on "Close" button.

Ø On clicking "Close" button, an option will appear for you to provide the Text for your Unsubscribed Link. You can edit the Text and click "Ok" button.

Ø On clicking "Ok" button, Unsubscribed Link will be added to your Email Message.

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Ø If you are familiar with HTML Code then you can also work with the Code Editor and make the changes in your HTML Email Template.
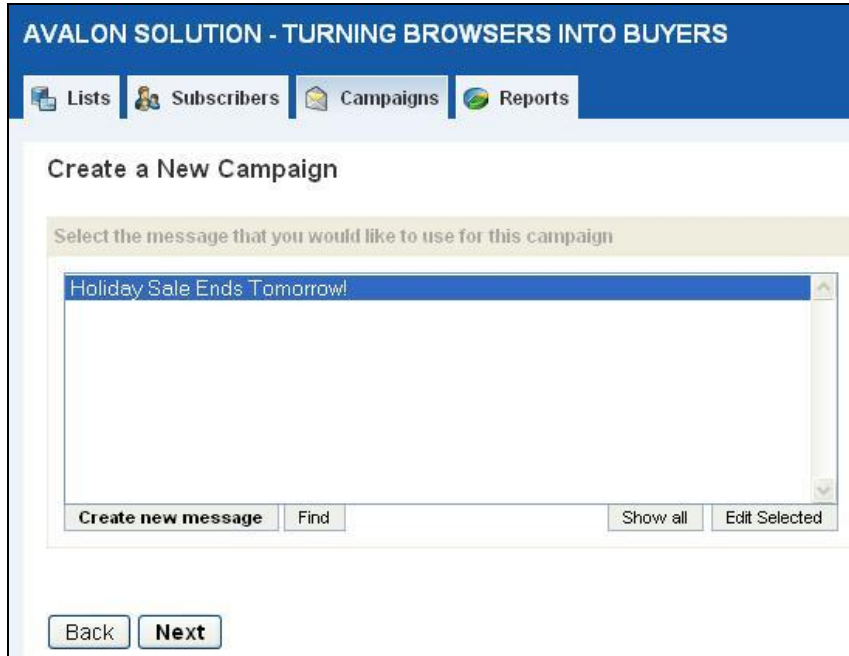

Ø Please review the contents of the Campaign and Click on **Add Message** button on the bottom of the page to get to the next step. Please do not attach any file along with your Campaign as it may spam your Email Campaign.

3.3 Ready with your Customized Email Message

Ø The campaign which we just created will be shown in select campaign box. If you have more than one message will appear accordingly in this box. Select the "Holiday Sale Ends Tomorrow" and click on **Next** button.

Ø You have the option to track the links, number of clicks on the links from your Customer in the HTML Template. Choose the options accordingly. We will recommend tracking all the links of the HTML Template. Also select the Additional Message Options as selected in the below shown screen. Select the appropriate option and click on **Next** button .
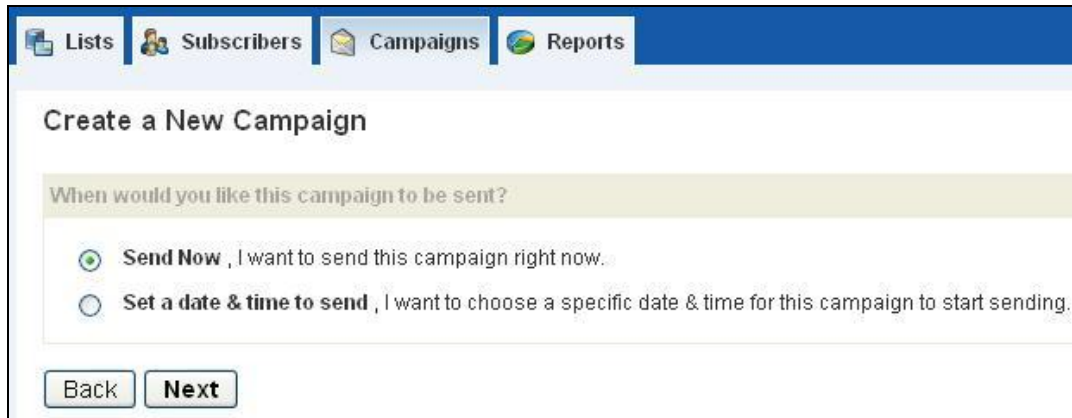
Ø You can either send the campaign on the same time or you can schedule it for later.
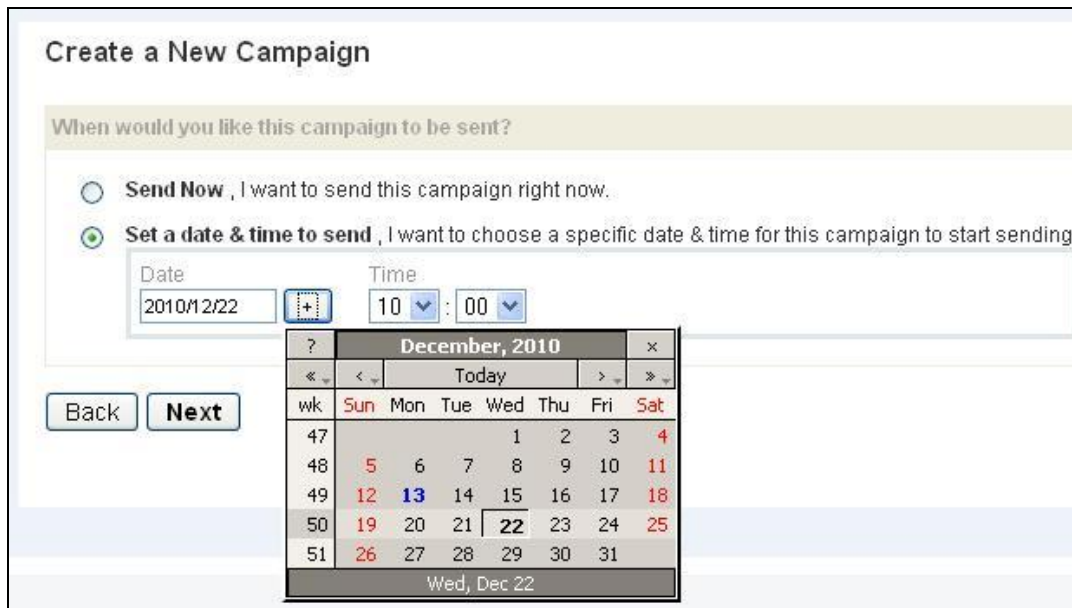
3.4 Schedule a Campaign

Ø If you select the option to schedule it, you will be asked to set a date and time to send. Enter a date and time on that you want to send that Email Campaign and click on **Next** button.
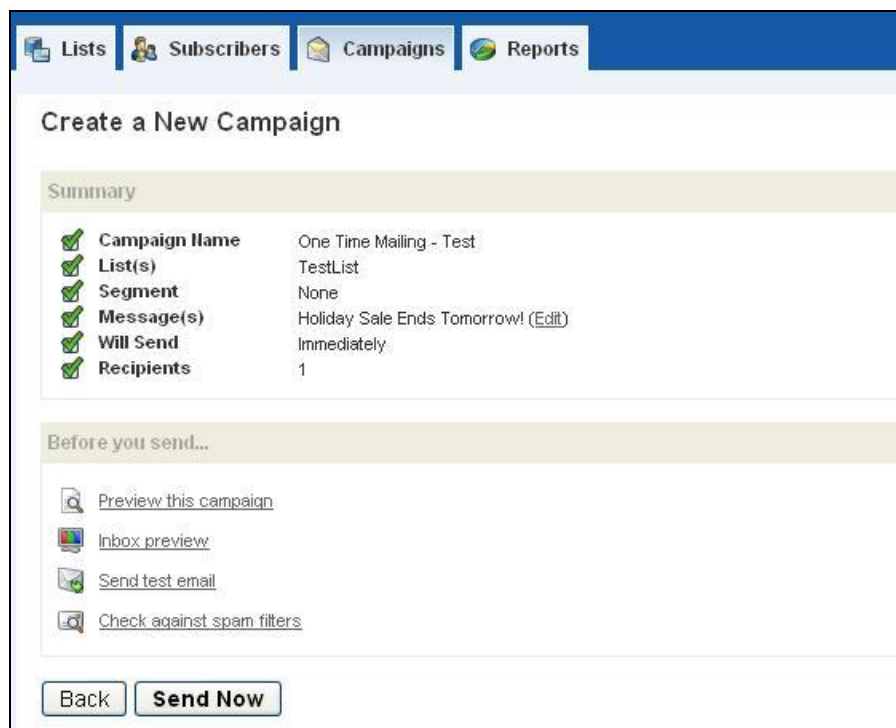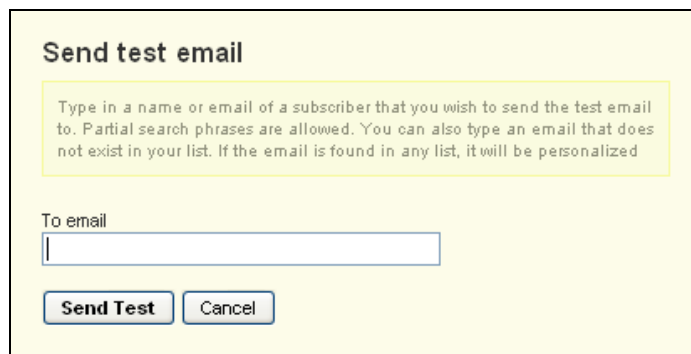
3.5 Send a Campaign Now

Ø If you select the option to send it now, you will be able to see the Campaign Summary and final check options before you send this campaign to your subscribers.

Ø The Summary will show you important information about your campaign.

Ø You can preview the campaign before sending and you can also send a test email. We recommend you to send a Test Email before sending Email Campaign to double check the formatting and contents of the Email Message.

Ø If you check the Test Email and everything looks proper then you can click on **Send Now** button to send the Campaign.

Ø Once you click on **Send Now** button, your Email Campaign will start delivering to your subscribers. If you have hundreds of subscribers in your List then Campaign may take some time to deliver Emails to Subscribers. You can click on View Campaigns button to view details of your recent Email Campaign as well as you can view Campaign Report for your recent Campaign.

Ø Please Note: There is a progress bar on the top right corner of the application. This Side Bar shows the progress of Campaign right from the starting to completion.

3.6   View Campaigns

Ø   You can view all Email Campaigns that you have sent so far. In order to view previously sent campaigns, please Mouse Over on **Campaigns** and click on **View Campaigns**.

Ø   You can view all Email Campaigns that you have sent so far. In order to view previously sent campaigns, please Mouse Over on **Campaigns** and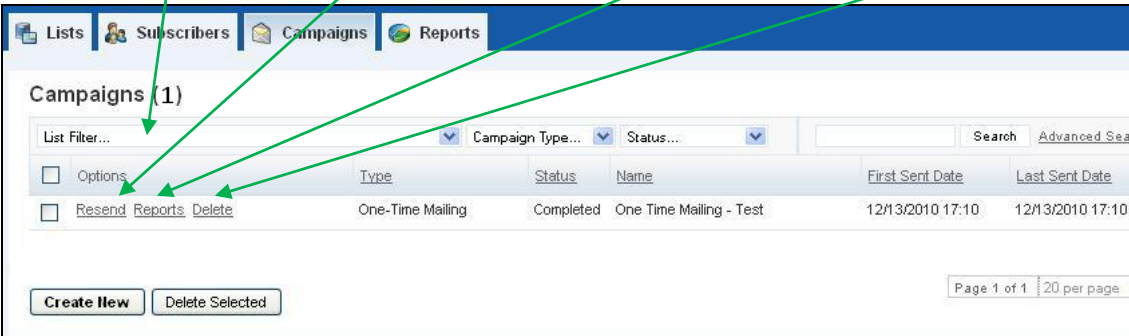 click on **View Campaigns**. You can Resend a campaign, view campaign Reports, Delete campaign, view the campaign, its contents, its lists of subscribers and many more options.

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3.7 Create an Email Message

Ø Email Messages provide you the facility to create and save the email messages. You can utilize the message for any of your Campaigns. To select this option, mouse over on Campaigns and click on Email Messages.

Ø Here you can see all previously sent Email Campaigns along with Edit and Delete option.
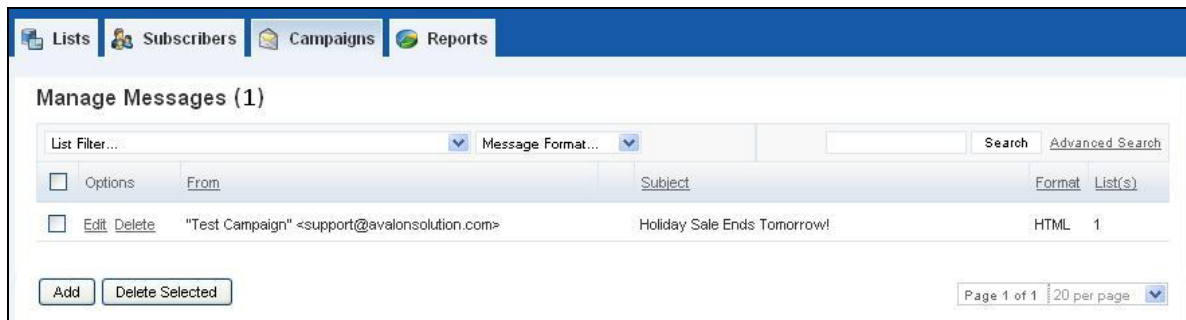
Ø Click on Add Button to create a new Email Message. There are same options to create an Email Message as you create a New Email Campaign. The only difference is the saved email message can be utilize any time to send in any of the campaign.

3.8 Avalon Solution's Default Email Templates

Ø Message Templates provides you more than 50 professional looking Email Templates that Avalon Solution has designed and created for you. To select this option, mouse over on Campaigns and click on Message Templates.

Ø You can use these Email Templates for your Campaigns. Avalon Solution has created these Email Templates specifically to fulfill your business needs.

4. Reports

Ø This feature provides you the facility to view the Reports of Campaigns you sent. You can check how many Customers opened your email campaign, clicked on links, forward the campaign etc.
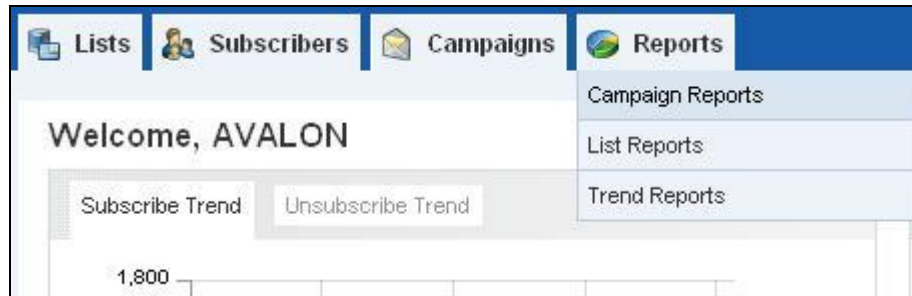
Ø To access the Report feature, please mouse over on **Reports** and you will get below three report options:

   i. Campaign Reports

  ii. List Reports

 iii. Trend Reports

4.1 Campaign Reports

Ø Campaign Reports provides Campaign-wise Report information. To view Reports for a specific Campaign, click on View Reports link against that Email Campaign.
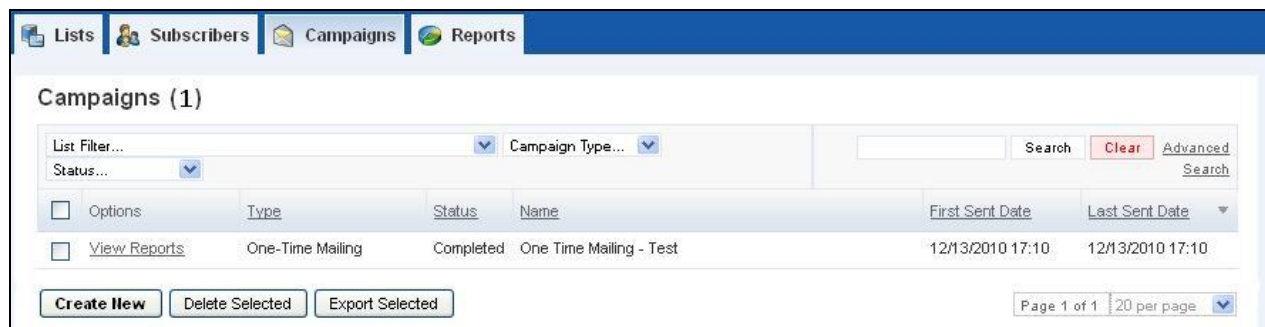
Ø This screen shows the information like type of the campaign, status of the campaign, name of the campaign and when it was sent for the first time and the last time. Since we have sent only one campaign, therefore it will show only one in the report box.

Ø The view the detailed report of the Campaign, click on the **View Report** link.

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Ø **Overview Tab** gives you the summary of the Campaign. This page shows you campaign overview in charts and graphs. By looking at this, you can easily find out the campaign status and its results.
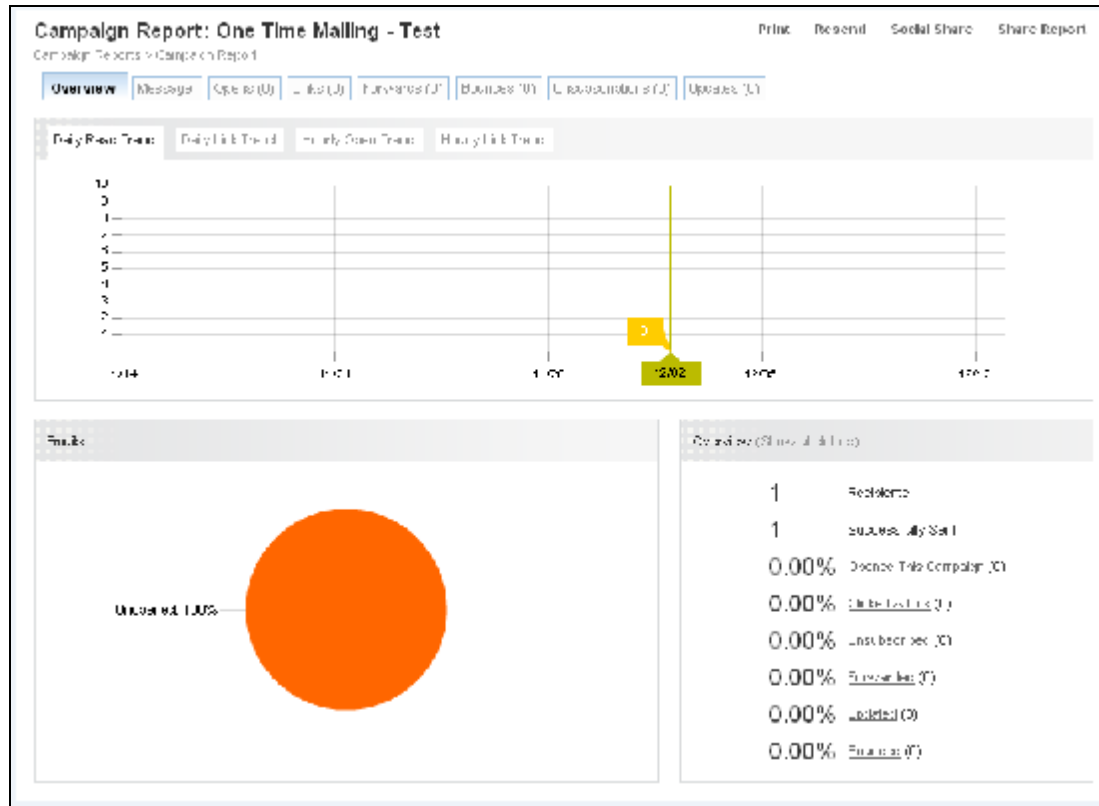
Ø **Message Tab** gives you the Message Content along with From Email Address and Subject of the Email Campaign.

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Ø **Opens Tab** shows you how many subscribers opened your Email Campaign and how many times they opened. This also shows many do not open your Email. You can also export the list in CSV Format Excel Sheet to target the Customer who showed interest in your Product and Company. In order to export the contents please click on Export on the right top corner of the tab.

Ø **Links Tab** provides the facility to track the links you provided in your Campaign. It shows how many customers clicked on any of the links, total Number of clicks and many more options to track your customers who showed interest in your product and company. If you click on respective link, it will show the details of the Subscriber who clicked on the link. The report will contain subscribers email address and total number of clicks they performed on the Link.

Ø Remaining four Tabs – Forwards, Bounces, unsubscriptions and updates gives you more detailed tracking of your Email Campaigns.

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4.2   List Reports

Ø   List Reports provides over all as well as List specific Subscribe, Unsubscribe and Open by Hour Trends.

4.3   Trend Reports

Ø   Trend Reports provides over all as well as List specific Open By Hour and Open By Week Day Trends.

5. Account Information

Ø   To view your Account Details, click on **Your Account** link on the right side of the bottom of the page.

Ø   You can view Your Account Information, Settings and Stats. You can also update your Account Password here.

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